

Finishing *the last*

Attention to detail on key
'little things' helps prevent them
from turning into big problems.

by **Helen M. Heneveld**

2%

Project management is the hidden success factor for hybrid dealers. This starts with the flow of a project and continues with closing the sale, training the customer and organizing and documenting the job. In all of those areas, attention to detail is the little thing that makes a big difference.

Starting with the sales department, project management needs the details on everything sold and included in the project. To make sure nothing falls through the cracks, have salespersons use design worksheets in the sales process set up by sub-system to identify such things as the locations, types and colors of wall outlets (phone and data), speakers and control options.

When estimating hours for a project, have standard hours per product or task, and use this information when calculating pricing on a proposal. Make sure the salesperson turns over everything needed by operations with a "project sold checklist."

Remember that paperwork on custom installation projects can be prolific. Information overload occurs and getting it organized makes things run efficiently. Documentation throughout each stage of a project is critical and must include the details. Always use the following key forms and include the details on them:

Wire chart Get the details of where it originates, terminates, wire type, the size back-box to use, device, exactly what height it should be at and assign a unique number or identifier to every wire.

Work orders Prior to heading out to the field identify every task to be completed, and after the field work record details on exactly what was accomplished, materials used and what remains to be done.

Change orders Get the details, actions to be taken, materials not needed, materials and equipment now added, and estimated labor to accomplish the change. Most

Project Sold Checklist

The handoff from sales to operations is critical and all of the details need to be included. A project sold checklist ensures that sales provides everything needed by project management at the beginning of the project and minimizes extra time spent later. It includes:

- ✓ Final proposal
- ✓ Signed acceptance agreement
- ✓ Deposit
- ✓ Project information sheet
- ✓ Design worksheets (communications, audio, security, lighting and more)
- ✓ Cabinet layout (if created by sales)
- ✓ Block diagrams (if created by sales)
- ✓ Schematics (if created by sales)
- ✓ Market floor plans (if available)
- ✓ Electronic CAD files (if available)

important, get signed and dated approval.

Custom installation projects often drag on. New projects start and the old ones just never seem to wrap up completely. Unfortunately, this can leave the last 2 percent of work that is needed to really complete the project and have a delighted customer unaddressed. This might work in busy times when new projects are always coming your way, but eventually it will catch up with you. In order to effectively deal with the last 2 percent of jobs, hybrid dealers should do the following:

Create a punch list Meet with the client, perform a walk-through to identify items not complete, write down everything and have the client sign off when each item is complete and approved.

Promptly complete the job In the words of Nike, "Just Do It." Have a final checklist for review at the completion of the job by the installers. Finish the punch list within one week and consider using a job completion signoff form that commits the client to pay all outstanding invoices, withholding no more than a small payment based on a few items remaining (but there shouldn't be any if you really did complete the punch list). Putting off completing those final touches might mean not getting paid.

Aesthetics Pay attention and make it look good. Align and straighten all devices such as speakers, wall plates, and keypads, including the mounting screws. Clean all devices of fingerprints and smudges, and be sure to always clean up after yourself. Use your vacuum, the one you keep on the truck (yes, every crew should have their own vacuum). Use a label-maker and have all wiring, wall plates and equipment labeled with the labels aligned straight. Remember, your work remains after you are finished and is a lasting impression of your commitment to excellence.

Documentation This must be accurate and thorough. Verify the project folder has the final "as-builts" for the systems installed including schematics, block diagrams, equipment list with serial numbers, programming (keep a back-up disc on site and one off site), and everything that is dated.

Final Project Punch List				
Item no.	Location	Description	Date complete	Owner approval (initial)
1.	Kitchen	Wall phone jack not straight		
2.	Front Door	Door intercom not working		
3.	Security	Adam's code doesn't work		
4.	Dining	Left speaker has static		
5.	Dining	Right speaker not straight		
6.	Family	Remote — CD button doesn't work		
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25.				

Date: 10/4/06
Homeowner: Hancock
Location: Lake Shore

Contractor: _____ Owner: _____

It helps to have a "punch list" of little things to ensure are done.

Training, training and training Don't view it as work; it's a sales call! Have the salesperson perform the client training since he sold the clients on the features. Don't leave training up to the technician at the end of a long day of trying to wrap up the installation. They will be tired, hurry through it and probably talk "tech talk." Schedule the initial training with plenty of time, arrive with a gift, and make it an enjoyable experience. Follow up a week later, a month later, six months later and every year after. Remember, training is also a sales call to up-sell or get referrals.

Follow-up It's important to follow through on all your commitments. Your clients trust you working in their home. Build a long-term relationship with them by keeping your word and acting promptly on their requests and your promises.

Of course, this attention to detail doesn't apply purely to work in the field. It applies to the office, too. Be disciplined and get invoices out weekly. Include accurate and detailed information on the invoices, anticipate customers' questions

and give them the answers on the invoice. Take time for the detail of collections by reviewing monthly and following up with letters, emails and phone calls. Don't let the small detail of not collecting the money affect cash flow. **CPR**

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Email the author, Helen Heneveld (helen@bedrocklearning.com), and she will send you a final punch list template.